

Marketing Plan Outline

1. The Mission Statement

It's always a good idea to state why you are doing what you are doing. Why are you marketing your community as a visitor destination? What is your *mission* in this effort. Give this some thought, and express the reasons that you came up with earlier in this handbook.

What is the *goal* of your organization relative to tourism? Is it to become a year-around destination? Is it to bring more visitors? Is it to get the visitors you already have to stay longer?

Express these reasons in a concise, well thought out mission statement of a paragraph or so. Then back that up with about two pages called ***Support for Mission Statement***. Expand on the significance of the tourism industry in California and your region. Talk about the benefits of tourism to the local residents through increased taxes collected and the development of community resources that can be shared by locals and visitors alike.

Helpful Hint: Remember, you are developing your visitor industry as a benefit to the community, so make sure to state your reasons with that in mind.



2. The Positioning Statement

This brief section *positions* your community or area as a visitor destination as you wish it presented. In other words, state what makes your community attractive to visitors. For example, you might say something like this:

Smallville is a beautiful mountain community, on the eastern edge of the Sierra Nevada range in central California. It has abundant fishing, hiking and miles of cross country ski trails. Lake Lonesome, located just five miles away, is a sailors paradise. Smallville is truly an undiscovered gem with the friendliest people in the West.

This is to clarify in your minds, and the minds of the readers, exactly how you envision Smallville being presented to visitors. It helps you keep your marketing efforts “on message.”

3. **Assets and Liabilities as a Visitor Destination**

This is where you take a hard look at what you have to offer, and what you lack. This will help you focus your marketing efforts. List the assets first (it will make you feel better!).

Make both lists, assets and liabilities, as extensive as you can.

Your asset list might look like this:

- Natural elements (mountains, deserts, lakes, rivers, hot springs, etc.)
- Man-made Attractions (parks, golf courses, entertainment venues, theaters, lodging, restaurants, etc.)
- Activities (shopping, hiking, bicycling, dining, horseback riding, touring, swimming and sunning, etc.)
- Subliminal parts of the product. This is the less obvious but equally important part of the product that makes visitors “feel good.” You might include clean air, little traffic, excellent climate, spectacular visual setting, informality (casual atmosphere), friendly people, etc.

Your liability list might look like this:

- Limited accessibility in winter due to snow build-up
- No airport
- No major hotels
- Only one road in and out
- Off the beaten path
- Unfriendly locals (we hope not!)
- Killer bee infestation, etc.

Helpful Hint: In many circumstances, the same thing might show up as both an asset and a liability. A perfect example would be “remote location.” Certainly your area could be a little hard to get to, but isn’t that what makes it worth getting to?



4. **The Baseline**

Where do you stand now in regards to your tourism industry? Is it healthy or non-existent? Using information we developed earlier in this handbook, take a look at:

- The tourism industry in your community and the surrounding area
- The overall economic environment in your community and the surrounding area
- Community attitudes toward the tourism industry
- The image of your community, both locally and among visitors
- The competition

5. Objectives

First, start by re-stating the mission statement. What do you wish to accomplish? Then, state your broad objectives, which might look like this:

- To create name awareness for Smallville
- To enhance the image of the community in the minds of potential visitors
- To increase the number of visitors to Smallville

Then, state more specific objectives that you hope to achieve through the methods and practices outlined in the Marketing Plan:

- To increase transient occupancy tax receipts
- To increase the number of overnight visitors
- To increase the length of stay of each visit
- To increase the frequency of repeat visits
- To increase mid-week business
- To increase off-season business

Next, identify the “target markets” most likely to generate the desired results relative to the objectives listed above. Don’t be too ambitious, as you’re not likely to have a huge budget for your initial marketing program. Keep the target market list to three or four segments.

Now, list specific marketing techniques that you will use to reach those goals. This is where you say “how” you are going to achieve results and *what those specific results are expected to yield*. An example might include:

- Use paid advertising to create a desire to visit our community within the target audience. *Advertising will generate 2,000 additional requests for information over our toll-free phone line, above the 4,000 received last year.*
- Generate publicity for our community in target markets through press releases. *We will generate two feature stories in major target newspapers next year.*
- Increase the number of tour bus visits to our community by 500 room-nights¹ through trade show attendance and personal contact with tour operators.
- Create a new visitor-oriented web site for our community that will generate interest in travel here. *This web site will generate 10,000 e-mail requests for information next year.*

¹ A room night is one room used for one night. Example: One guest staying three nights generates three room nights. Three guests each staying one night also generates three room nights.

- Use special events to increase interest in our community, *by creating two new special events designed to generate overnight visitation this year.*
- To increase transient occupancy tax collections in our community by five percent.

As you can see, you should list specific goals with measurable outcomes. Use the previous year as a base from which to measure progress. Certain things, such as transient occupancy tax, the number of requests for information over a telephone line or by written request should be easy to measure. You may have to come up with “educated guesses” regarding baseline numbers for such things as room nights generated by tour bus visits if the hotels view this information as proprietary.

(Don’t worry if hotels and other businesses are a little cautious at first about sharing hard data with you. As they grow comfortable with your professionalism and ability to keep material confidential, they will provide the information you need.)

Remember to be specific to your area as you set your measurable goals. For example, you might want to establish a goal of increasing the number of people staying in your local campground, or the visitor fees into your community museum.

Also, try to use as many goals *that can be undeniably attributed to your marketing program* as possible. This would include specific responses to advertising or new tour bus business that came after you met the operator at a major trade show. You will always run into the local politician who says your efforts had no effect on the local tax revenue; it would have gone up anyway. You might want to use follow-up surveys of people who responded to advertising and requested information to determine how many actually visited, and if the material positively influenced their decision to visit.

6. The Budget

Alas, we have come to the most challenging part of the marketing plan, the development of the budget. The question of how much money to spend on promotion and advertising for your community has as many different answers as you have interested parties to the process. The local business people will likely say “as much as possible” and the local politicians and residents might well respond with “as little as possible” or even “nothing!”

There are two popular approaches, neither is right or wrong.

- **The Entitlement Approach:** This makes the assumption that the business community/ lodging community is “entitled” to a portion of the transient occupancy tax that it collects. Transient occupancy tax or “T.O.T.” was first collected *for the purpose of tourism promotion*. A small tax was placed on every hotel or motel room rental to be used to advertise the community. As cities began to collect larger and larger amounts of this tax, they eventually put the bulk of the money into their “general funds” which can be used for a variety of municipal purposes. The tourism industry then found that it often had to convince municipal or county officials that it was entitled to any share at all.

If you chose to go this route, you'll want to know that the average amount of transient occupancy tax used in California for tourism promotion, convention center promotion, etc. was 17%-20% of the tax collected according to a survey done in 1998 by the Ventura Visitors & Convention Bureau. Of course, the percentage of the tax collected that you wish to ask for varies tremendously depending on the overall amount collected in your area and what it is currently used for. You can ask for more or less, it's your decision.

- **The Programmatic Approach:** This approach makes the assumption that it will cost a certain amount of money to “get the job done” and that is the amount you should budget. City and county officials, who may strongly feel that no entity is “entitled” to a portion of tax, frequently favor this method. This is how they do their own departmental budgets, unless constrained by legislation that directs them to do otherwise.

Which approach to use is probably the single most controversial political aspect of tourism promotion. You should discuss these options with your advisory committee, local government officials and the local tourism industry. Make sure you have solid political support and can present an effective case for your marketing program, whichever method of funding you choose.

Once you've decided upon a budget approach, you may start with the suggested format we've provided later in this chapter to develop your budget. Then, as you outline your marketing programs you will want to include the budgeted expense of each program for quick reference. This makes it easy for everyone reading the plan to understand its cost.

7. **Target Markets by Priority**

List your target markets by priority and describe your rationale in choosing each one. Remember to limit your targets to about three or four. Then outline your objectives, strategies and materials that will be needed for each market.

8. **Advertising**

Describe your proposed advertising program and its costs. You will want to work closely with your group of local experts including advertising sales representatives or agency personnel as we described during the creation of your “creative team.”

You will want to break “advertising” down into paid media placement, creative costs (the costs of hiring someone to design the ads), production costs (the cost of duplicating and preparing each ad for publication) and fulfillment costs (the cost of sending out response materials).

List the goals of your advertising program, who you want to reach and why. Advertising goals might be:

- To create interest in our destination among first time visitors
- To create a desire to return to our destination among those who have visited before
- To generate requests for information on our community
- To provide a presence for our community in target publications
- To increase inquiries about our community by travel agents and writers

If you've ever taken a journalism class, this is the time to remember the "five W's" that were important to every news story, because they are just as applicable here. They are "Who, What, Where, When, Why and How" and if you answer those questions about your advertising program, you will be in excellent shape.

Don't be overwhelmed by this! Take a look at your target markets, when you want to reach them and what you want to say. Get professional advice, and if your budget is big enough, you might want to contract with a local advertising agency to do this part for you.

9. **Public Relations**

The next chapter of this book is dedicated to developing public relations activities for your community. Please review it before you develop this portion of the marketing plan.

10. **Trade and Travel Shows**

You may choose to attend professional shows for either travel professionals (trade shows) or the traveling public (travel shows). List the trade or travel shows that you plan to attend, the target markets that they address, and your rationale for attending them. Don't forget to include the cost of each show, including registration, travel and expenses, booth development, collateral materials (like brochures printed especially for the show), etc.

11. **Special Projects**

This might include Internet web site development, any new special events you might want to create (be careful, as these are extremely labor intensive!), special projects in regional target markets, or perhaps a direct mail program.

Helpful Hint: *Don't be too ambitious with special projects in your first year effort. You want this program to succeed, not fail because there wasn't enough time or available help to get the job done!*



12. **Administration & Timeline**

Take a realistic look at who is going to do all of this work and how you are going to get the job done. Is extra staff necessary, and can the funds for this be included in the budget? Where will the staff work and what equipment will be needed? It's best to face these issues squarely and early in the process. *It is unrealistic to expect to begin a tourism marketing program without additional overhead costs.* Don't let this issue backfire on you later by presenting a marketing program with no administrative costs, it just isn't realistic!

You'll also find that we've supplied a "timeline form" for you to begin formulating your program chronologically.

Program Evaluation

Lay out your plans to evaluate the marketing program and make modifications for future years. You should be constantly looking at what works and what doesn't as the year progresses, but a formal evaluation in the eleventh month is an excellent idea. Use the results in formulating new strategies and modifying existing ones. You might even want to change some of your goals for your programs, if they appear either too low or too lofty as the year goes by.

First, evaluate the process:

- Did your strategies match your target market segments
- Were your time lines realistic?
- Were you required to make adjustments? Should you make adjustments?
- What monitoring system are you using? Does it measure what you want to know?
- How can you monitor your progress better next time?
- How close were your budget estimates to the actual costs?

Next, evaluate the results:

- Did you accomplish what you set out to accomplish? If not, did you make progress toward your goals?
- What quantitative measures (numbers) indicate you achieved your goals, or made progress toward them?
- Were there some unexpected problems that produced lower results than expected? These could include events beyond your control, such as bad weather, critical or unfavorable media coverage, closure of a highway or major attraction or facility, or a downturn in economic conditions.
- In light of results and costs, what changes or refinements will you make next time?

Helpful Hint: Use the Seasonality Chart that you developed earlier to determine the timing of such programs as advertising and public relations, remembering to “work ahead” so that your advertising and promotions run when people are planning their vacations, not when the decision has already been made.

